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SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Travel Date(s): _____

Description/Title of Attached Forms: _____

Private Sponsor Travel Certification Forms

Purpose of Amendment (describe the reason for amending original submission): The previous post-travel submission contained the interim version of the Private Sponsor Travel Certification Form (PSTCF). This amendment contains the final version for the PSTCF.


(Signature of Traveler)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): CONGRESSIONAL INSTITUTE
2. Description of the trip: An educational policy conference to examine important issues with policy experts and Members of the House and Senate.
3. Dates of travel: January 31 - February 2, 2018
4. Place of travel: White Sulphur Springs, WV
5. Name and title of Senate invitees: See Attached List
6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR -
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Congressional Institute is the sole organizer and conductor of this event.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The purpose of the Congressional Institute (a 501(c)4 organization) is to promote public education about Congress and to hold educational conferences for Members of Congress, staff and others.

The Congressional Institute has a long history of sponsoring educational conferences

for Members of Congress and staff. The Institute also sponsors retreats for Chiefs

of Staff and Legislative and Communication Directors.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Institute conducts important research projects consistent with its mission and
develops resources such as a House Floor Procedures Manual and the book Surviving
Inside Congress. The Institute also manages the Congressional Art Competition.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$267	\$93 + tax	\$64	\$223 Facility Rental
<input type="checkbox"/> Actual Amounts	Spouse (if applicable): \$267	Spouse (if applicable): \$0	Spouse (if applicable):\$64	Spouse (if applicable):: \$157 Facility Rental

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This event is arranged and organized specifically with regard to congressional
participation.

18. Reason for selecting the location of the event or trip

Relative proximity to Washington DC and capability to handle a large event and
the associated security that accompanies it.

19. Name and location of hotel or other lodging facility:

The Greenbrier, 300 W Main St, White Sulphur Springs, WV 24986

20. Reason(s) for selecting hotel or other lodging facility:

Proximity to DC, facility size, Security and availability

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging: Per Diem: \$93 vs. Our room rate: \$93

Meals: Per Diem (2 half days): \$76.50 vs. our meal costs: \$64

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Attendees will travel via charter coach-class train to the Greenbrier and by bus on
the return trip.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: 

Name and Title: Mark Strand, President

Name of Organization: Congressional Institute

Address: 1700 Diagonal Road #730, Alexandria, VA 22314

Telephone Number: 703-837-8812

Fax Number: 703-837-8817

E-mail Address: Strand@conginst.org

PRIMARY TRIP SPONSOR FORM ADDENDUM

Question 16: Other Expenses:

The estimated lodging rate and per participant food/refreshment expense figure for this event (and provided on this form) do not include the separate costs to the Congressional Institute to rent conference/banquet space large enough to accommodate this large event with appropriate security and audio/visual capabilities necessary to conduct our program. Dividing these conference and facility rental costs by the number of participants estimated to attend this event, the estimated figure would be \$223 as disclosed on the sponsor form.

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2018: Senate Staff

First Name	Last Name	Institution	Job Title
John	Abegg	Office of the Senate Majority Leader	Chief Counsel
Chris	Barkley	Senate Republican Policy Committee	Policy Director
Barry	Black	Chaplain of the Senate	Chaplain
John	Chapuis	Office of the Senate Majority Whip	Policy Advisor
David	Cleary	Office of Senator Alexander	Chief of Staff
Steve	Donaldson	Office of the Senate Majority Leader	Policy Advisor
Laura	Dove	Secretary for the Majority	Secretary for the Majority
Robert	Duncan	Assistant Secretary for the Majority	Assistant Secretary for the Majority
Brendan	Dunn	Office of the Senate Majority Leader	Policy Advisor & Counsel
Antonia	Ferrier	Office of the Senate Majority Leader	Communications Center Staff Director
Ann Marie	Hauser	Senate Republican Conference	Deputy Staff Director
Tom	Hawkins	Office of the Senate Majority Leader	National Security Advisor
Beth	Jafari	Office of Senator Cornyn	Chief of Staff
Dan	Kunsmann	Senate Republican Policy Committee	Staff Director
Bronwyn	Lance-Chester	Senate Republican Policy Committee	Communications Director
Jane	Lee	Office of the Senate Majority Leader	Policy Advisor
Katie	Lingle	Senate Republican Conference	Press Secretary
Hazen	Marshall	Office of the Senate Majority Leader	Policy Director
Stacy	McBride	Senate Rules Committee	Chief of Staff
Dominique	McKay	Senate Republican Conference	Press Secretary
Stefanie	Muchow	Office of the Senate Majority Leader	Director of Operations
Brendon	Plack	Senate Republican Conference	Staff Director
David	Popp	Office of the Senate Majority Leader	Communications Director
Monica	Popp	Office of the Senate Majority Whip	Chief of Staff
Scott	Raab	Office of the Senate Majority Leader	Policy Advisor
Natalie	Rogers	Office of Senator Gardner	Chief of Staff

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Matt	Sandgren	Office of Senator Hatch	Chief of Staff
Chandler	Smith	Senate Republican Conference	Communications Director
Sharon	Soderstrom	Office of the Senate Majority Leader	Chief of Staff
Don	Stewart	Office of the Senate Majority Leader	Deputy Chief of Staff
Emily	Stotmeister	Senate Republican Conference	Staff Assistant
Erica	Suares	Office of the Senate Majority Leader	Policy Advisor
Terry	Van Doren	Office of the Senate Majority Leader	Communications Director
Ryan	Wrasse	Senate Republican Conference	Policy Advisor for Nominations
Kathy	Wright	Office of the Senate Majority Leader	

Raab, Scott (McConnell)

From: Abegg, John (McConnell)
Sent: Wednesday, January 2, 2019 4:05 PM
To: Raab, Scott (McConnell)
Subject: Post-Travel Submission—CONGRESSIONAL INSTITUTE 2018
Attachments: Final PSTCF - Congressional Institute Trip 2018.pdf

Scott,

Per our discussion, the Ethics Committee would like some staff in our office to update their post travel forms from last year's trip to White Sulphur Springs, W.Va., by including the attached final Private Sponsor Travel Certification Form (PSTCF). (The earlier submission had the interim version of this form.)

When you submit this form, please fill out and include the cover sheet that is available at the link below. In speaking with the staff of the Ethics Committee today (Joseph Lenz), the cover sheet may be filled out as follows:

Name of Traveler: [McConnell staff member]
Employing Office: Office of the Majority Leader
Travel Expenses Paid by: The Congressional Institute
Travel Dates: 1/31/18 to 2/1/18.
Description/Title of Attached Forms: Private Sponsor Travel Certification Form
Purpose of Amendment (describe the reason for amending original submission): The previous post-travel submission contained the interim version of the Private Sponsor Travel Certification Form (PSTCF). This amendment contains the final version of the PSTCF.

Please submit this paperwork to the Office of Public Records (not the Ethics Committee) in SH 232.

The original email from the Ethics Committee is below.

Please let me know if you have any questions.

Thanks.

John

From: Lenz, Joseph (Ethics)
Sent: Thursday, August 2, 2018 12:21 PM
To: Abegg, John (McConnell) <John_Abegg@mcconnell.senate.gov>
Subject: Post-Travel Submission—CONGRESSIONAL INSTITUTE 2018

Dear Mr. Abegg,

The Select Committee on Ethics (the Committee) has received a copy of your post-travel submission from the Office of Public Records (OPR). After reviewing your submission, we have identified the following issue(s) that must be corrected in order to complete the post-travel process and close your file. Please find detailed instructions below on how to correct these issues. Submit the appropriate materials directly to OPR in SH-232.

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/Time Stamp

Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the **Office of Public Records** in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: K. Scott Raab

Employing Office/Committee: Office of the Majority Leader

Travel Expenses Paid by (List all sources): The Congressional Institute

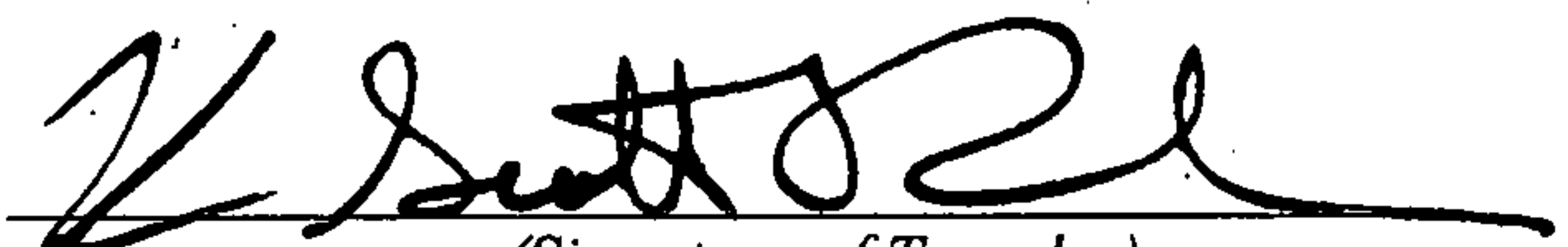
Travel Date(s): 1/31/2018 to 2/1/2018

Description/Title of Attached Forms: Private Sponsor Travel Certification Forms

Purpose of Amendment (describe the reason for amending original submission): The previous post-travel submission contained the interim version of the Private Sponsor Travel Certification Form (PSTCF). This amendment contains the final version of the PSTCF.

1/2/2019

(Date)


(Signature of Traveler)

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4. Place of travel: White Sulphur Springs, WV
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 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
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 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
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The Congressional Institute is the sole organizer and conductor of this event.

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The purpose of the Congressional Institute (a 501(c)4 organization) is to promote
public education about Congress and to hold educational conferences for Members
of Congress, staff and others.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

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for Members of Congress and staff. The Institute also sponsors retreats for Chiefs
of Staff and Legislative and Communication Directors.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

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Signature of Travel Sponsor: 

Name and Title: Mark Strand, President

Name of Organization: Congressional Institute

Address: 1700 Diagonal Road #730, Alexandria, VA 22314

Telephone Number: 703-837-8812

Fax Number: 703-837-8817

E-mail Address: Strand@conginst.org

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2018: Senate Staff

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Chris	Barkley	Senate Republican Policy Committee	Policy Director
Barry	Black	Chaplain of the Senate	Chaplain
John	Chapuis	Office of the Senate Majority Whip	Policy Advisor
David	Cleary	Office of Senator Alexander	Chief of Staff
Steve	Donaldson	Office of the Senate Majority Leader	Policy Advisor
Laura	Dove	Secretary for the Majority	Secretary for the Majority
Robert	Duncan	Assistant Secretary for the Majority	Assistant Secretary for the Majority
Brendan	Dunn	Office of the Senate Majority Leader	Policy Advisor & Counsel
Antonia	Ferrier	Office of the Senate Majority Leader	Communications Center Staff Director
Ann Marie	Hauser	Senate Republican Conference	Deputy Staff Director
Tom	Hawkins	Office of the Senate Majority Leader	National Security Advisor
Beth	Jafari	Office of Senator Cornyn	Chief of Staff
Dan	Kunsmann	Senate Republican Policy Committee	Staff Director
Bronwyn	Lance-Chester	Senate Republican Policy Committee	Communications Director
Jane	Lee	Office of the Senate Majority Leader	Policy Advisor
Katie	Lingle	Senate Republican Conference	Press Secretary
Hazen	Marshall	Office of the Senate Majority Leader	Policy Director
Stacy	McBride	Senate Rules Committee	Chief of Staff
Dominique	McKay	Senate Republican Conference	Press Secretary
Stefanie	Muchow	Office of the Senate Majority Leader	Director of Operations
Brendon	Plack	Senate Republican Conference	Staff Director
David	Popp	Office of the Senate Majority Leader	Communications Director
Monica	Popp	Office of the Senate Majority Whip	Chief of Staff
Scott	Raab	Office of the Senate Majority Leader	Policy Advisor
Natalie	Rogers	Office of Senator Gardner	Chief of Staff

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Matt	Sandgren	Office of Senator Hatch	Chief of Staff
Chandler	Smith	Senate Republican Conference	Communications Director
Sharon	Soderstrom	Office of the Senate Majority Leader	Chief of Staff
Don	Stewart	Office of the Senate Majority Leader	Deputy Chief of Staff
Emily	Stotmeister	Senate Republican Conference	Staff Assistant
Erica	Suares	Office of the Senate Majority Leader	
Terry	Van Doren	Office of the Senate Majority Leader	Policy Advisor
Ryan	Wrasse	Senate Republican Conference	Communications Director
Kathy	Wright	Office of the Senate Majority Leader	Policy Advisor for Nominations